



Local Account Administrators

DLS Gateway allows your community's finance and executive officials to enter, review, submit, and check approval status on valuation, tax rate, and accounting processes overseen by the Department of Revenue.

Only officials with login accounts can access this information or perform these on-line functions. DLS has already created accounts for certain key officials, one for each department, to initiate data submission for FY2009: one account in the assessors, accountant/auditor, city clerk, elections commission, and board of licenses. DLS or local users may have added additional accounts over the last two years for certain users for certain functions.

Why does DLS need local account administrators? As multiple departments in 352 cities and towns and over 100 districts begin to fully use the programs in DLS Gateway, additional users will ask to be authenticated as municipal employees and authorized to perform certain roles because of their responsibilities. Only a local official can realistically know who is currently working for the municipality and in what capacity.

What would a local account administrator need to do? The list of responsibilities is short and requires no special skills –

Use the Security module to add, update, or inactivate DLS Gateway accounts. Adding an account consists of creating a username, an initial password, and setting appropriate permissions. In pilot testing and regular usage, non-technical municipal staff persons have performed these tasks relying on simple documentation or intuitive logic. No special training is necessary. Updating consists of revising permissions as appropriate. Inactivating consists of clicking an Active checkbox.

Work with the city/town clerk or department staff to update entries in the Local Officials Directory. The Security module looks to the Local Officials Directory module to identify municipal employees for DLS Gateway accounts. City/town clerks can update employees in any department, while department employees typically have permission to update in their department. Local account administrators have permission, like city/town clerks, to update employees in any department. DLS staff attempt to keep listings for key officials up-to-date and make many changes as information happens to come their way. But information for many communities takes months or even years to filter into state agencies. Only local officials can reliably know on a current basis who has just been employed, who has changed jobs within the community, and who has retired or moved on.

What is the most difficult responsibility? Setting appropriate permissions requires knowledge of department functions as they relate to state regulatory processes. Department employees know what they need, **but the following screens summarize the typical settings for typical users.** DLS Gateway's primary users, i.e. those who actually enter and submit data to the Department of Revenue, consist of assessors, accountant/auditors/finance directors/comptrollers, and those officials who submit so-called ALIF (license information) – city/town clerks, licensing boards, boards of health, and selectboards.

Typical Assessing Department Settings (where assessors are the final officials to check and submit tax rate “recap” data).

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	<input type="radio"/> None <input checked="" type="radio"/> Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
LA3-EQV-PROCESS	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
LA3-UPLOAD-PROGRAM	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
LICENSEE	<input checked="" type="radio"/> None <input type="radio"/> Allow
MISC-FORMS	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
PROVIDER	<input checked="" type="radio"/> None <input type="radio"/> Allow
SCHEDULE-A	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
SCHEDULE-A-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read
SECURITY/SYSTEM ADMIN	<input checked="" type="radio"/> None <input type="radio"/> Allow
TAXRATE-BLA	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
TAXRATE-BOA	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
TAXRATE-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read

Local Official's Directory-Edit Capability

☐ Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments.

Available Departments

- 100 - Town/Citywide
- 114 - Moderator
- 122 - Selectmen/Town Council
- 123 - City/Town Manager
- 129 - Other Executive
- 135 - Accountant/Auditor
- 145 - Treasurer
- 146 - Collector
- 151 - Law Department Town/City Council

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Selected Department(s)

- 141 - Assessors

Typical Accountant/Auditor/Finance Director/Comptroller Department Settings

(Substitute Finance Director or Comptroller for Accountant/Auditor in Directory-Edit Capability as appropriate.)

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	<input type="radio"/> None <input checked="" type="radio"/> Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-EQV-PROCESS	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-UPLOAD-PROGRAM	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LICENSEE	<input checked="" type="radio"/> None <input type="radio"/> Allow
MISC-FORMS	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
PROVIDER	<input type="radio"/> None <input checked="" type="radio"/> Allow
SCHEDULE-A	<input type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input checked="" type="radio"/> Submit
SCHEDULE-A-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read
SECURITY/SYSTEM ADMIN	<input checked="" type="radio"/> None <input type="radio"/> Allow
TAXRATE-BLA	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
TAXRATE-BOA	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
TAXRATE-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read

Local Official's Directory-Edit Capability

☐ Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments.

Available Departments

- 100 - Town/Citywide
- 114 - Moderator
- 122 - Selectmen/Town Council
- 123 - City/Town Manager

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Selected Department(s)

- 135 - Accountant/Auditor

Typical City/Town Clerk Settings

Note Local Official's Directory Edit Capability is set to ALL departments.

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	<input type="radio"/> None <input checked="" type="radio"/> Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-EQV-PROCESS	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-UPLOAD-PROGRAM	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LICENSEE	<input type="radio"/> None <input checked="" type="radio"/> Allow
MISC-FORMS	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
PROVIDER	<input type="radio"/> None <input checked="" type="radio"/> Allow
SCHEDULE-A	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
SCHEDULE-A-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read
SECURITY/SYSTEM ADMIN	<input type="radio"/> None <input checked="" type="radio"/> Allow
TAXRATE-BLA	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
TAXRATE-BOA	<input type="radio"/> None <input type="radio"/> Read <input checked="" type="radio"/> Save <input type="radio"/> Submit
TAXRATE-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read

Local Official's Directory-Edit Capability

☒ Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments.

Available Departments

122 - Selectmen/Town Council
123 - City/Town Manager
133 - Finance Director

Selected Department(s)

Typical settings for department charged with submitting ALIF licensing information.

(Substitute License Commission for departments in Directory-Edit Capability as appropriate.)

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	<input type="radio"/> None <input checked="" type="radio"/> Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-EQV-PROCESS	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-UPLOAD-PROGRAM	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LICENSEE	<input type="radio"/> None <input checked="" type="radio"/> Allow
MISC-FORMS	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
PROVIDER	<input checked="" type="radio"/> None <input type="radio"/> Allow
SCHEDULE-A	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
SCHEDULE-A-REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Read
SECURITY/SYSTEM ADMIN	<input checked="" type="radio"/> None <input type="radio"/> Allow
TAXRATE-BLA	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
TAXRATE-BOA	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
TAXRATE-REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Read

Local Official's Directory-Edit Capability

☐ Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments.

Available Departments

122 - Selectmen/Town Council
123 - City/Town Manager
133 - Finance Director
135 - Accountant/Auditor
141 - Assessors

Selected Department(s)

165 - License Commission

Typical Local Account Administrator settings

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	<input checked="" type="radio"/> None <input type="radio"/> Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	<input type="radio"/> None <input checked="" type="radio"/> Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-EQV-PROCESS	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LA3-UPLOAD-PROGRAM	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
LICENSEE	<input type="radio"/> None <input checked="" type="radio"/> Allow
MISC-FORMS	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
PROVIDER	<input type="radio"/> None <input checked="" type="radio"/> Allow
SCHEDULE-A	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
SCHEDULE-A-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read
SECURITY/SYSTEM ADMIN	<input type="radio"/> None <input checked="" type="radio"/> Allow
TAXRATE-BLA	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
TAXRATE-BOA	<input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Save <input type="radio"/> Submit
TAXRATE-REPORTS	<input type="radio"/> None <input checked="" type="radio"/> Read

Local Official's Directory-Edit Capability

☒ Provide access to this user to edit personnel in **ALL** Departments. New departments added will be assigned automatically.

OR

Provide access to **SELECTIVE** Departments(select from the list below) for this user to edit personnel in the selected Departments.

Available Departments	Selected Department(s)
122 - Selectmen/Town Council 123 - City/Town Manager	

What about Lost or Forgotten Passwords?

Users can now reset their own passwords. If they forget their User Name, the system will refer them to you for assistance.

Password is case-sensitive

System times out after 30 minutes without use. Login again to continue.

[Forgot password](#)

[Forgot user name](#)

[City/Town Official Directory](#)

Obtain User Name

Select your Jurisdiction and contact the administrator to obtain a User Name

Jurisdiction	Eastham - 086	Go
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You would click on the Security tab and then on the *Search User* link. If they don't have an account, you would click on the *User Maintenance* link and select the user to add an account. If they have an account, it will show up in the resulting grid, as illustrated below:

Search User

Search Result

EASTHAM

Jurisdiction





[Search User](#)

[Clear](#)

Last Name

First Name

User ID

User Name	User Id	Department	Jurisdiction
Crowley, Jane		Health Inspection/DOH/BOH	Eastham
Fitzback, Gail A.		Assessors	Eastham
Lamperti, Lillian		City/Town Clerk	Eastham
Wall, Jane		Accountant/Auditor	Eastham
Previous Next			

If they forget their password, they click on the Forgot Password link on the main landing page. They are prompted for an answer to a hint, and a temporary password (one time use) is emailed to their address in the Local Officials Directory. They use the temporary password to log in and to reset their password after clicking on *My Profile* in the upper right corner of any DLS Gateway page.

My Profile

Logged In: Joanna Jones

User Profile Information

This screen shows your complete profile. The non-password details are un-editable and are for viewing purpose only. You may modify your password settings and provide a new password for your login to the system. If you require any help, please contact an administrator from the list provided below.

If you have obtained a temporary password, you must change the password now.

Jurisdiction	<input type="text" value="Carver"/>	Position	<input type="text" value="Special Assistant"/>
Person	<input type="text" value="Joanna Jones"/>	Department	<input type="text" value="Assessors"/>
User Name	<input type="text" value="JONESJ"/>	Email ID	<input type="text" value="jones.j@carverma.com"/>
Telephone	<input type="text" value="508-866-3400"/>	Administrators	<input type="text" value="McGrath, Jean: 508-999-3403"/>

Password Settings

Current Password	<input type="password"/>	Password Hint	<input type="text" value="What is your city of birth?"/>
New Password	<input type="password"/>	Answer	<input type="text"/>
Re-enter Password	<input type="password"/>		

[Cancel](#)

[Save](#)

On-line Security Help Information copied here as a further reference:

Security

Security allows local account administrators to

1. Create and manage User Names and passwords for their community's system users.
2. Set permissions for users relative to the functions their departments perform.
3. Inactivate users who have resigned, retired, or otherwise no longer need access.

SEARCH USER

If your community has a list of officials entered in the Local Officials Directory who also have login accounts, you can use the search function to find them by name or User Name. If they exist in the Local Officials Directory but do not have login accounts, find them first in User Maintenance (below) and then create an account.

SELECTION

Enter all or part of their name or User Name and click Search User. Click on the appropriate link under User Name. When the account settings appear, modify and save as appropriate.

USER MAINTENANCE – Login Modification

PERSON

A person is a local official entered in the Local Officials Directory for a specific local government function in a specific community. If a person performs two functions in the community, e.g. Collector and Treasurer, that person can have permissions set for each position or function under one user account, but the position title that corresponds to that account will appear on form signature lines. A person who performs services for more than one community must have a person entry for each community, with permissions set for the role they play in each.

USER NAME / PASSWORD

The User Name not case-sensitive. If the User Name is already in use, an alternative must be used. User Name's are specific to named individuals. The password should be a combination of letters and numbers, ideally random. Users can re-set their passwords using a password re-set program that will email a temporary password to their official email address.

ACTIVE

Users are not deleted from the database, because it is important to keep a permanent record of their activities, e.g. what they submitted, what they changed, etc. When a person is "deleted" from the Local Officials Directory or their account is "deleted" in DLS Gateway, their status changes from Active to Inactive. The effect is as if they were deleted, but a record of what they did remains.

ADA COMPLIANCE CHECK

Enables versions of internal DLS screens that are enhanced for the visually impaired. **Municipal users can ignore this feature.**

PERMISSIONS

The permissions currently set for this user are displayed and can be changed by a local security administrator.

None = No permission to see screens or information in this module or submodule. The module tab will not appear on the user's screen.

Allow = Permission for the functions allowed within separate modules (ALIF, APIF, Local Officials Directory)

Read = Permission to see but not add or change data in a module or submodule.

Save = Permission to Save information on a module or submodule form that can be submitted by others with Submit permission.

Sign-Only = Permission to sign a form but not to save or submit changes to the form. In development and not yet implemented.

Submit = Permission to submit a completed, signed form on behalf of the community.

Approve = DLS users only – Permission to approve a community submission. Approved forms are locked and can only be amended by an unapproval process.

DEPARTMENTS

Local Official's Directory-Edit Capability

Within the Directory module, a municipal user can have the ability to add/update/delete officials in all departments or in selected departments. To give the user rights to edit users in all departments, check the box so labeled. To allow the user to edit selected departments (beyond their own) highlight the departments in the Available Departments box and move them into the Selected Departments box with the > button.

SAVE

When satisfied with the permissions set for this user, click the **Save** button at the bottom of the form.